

FIG.1

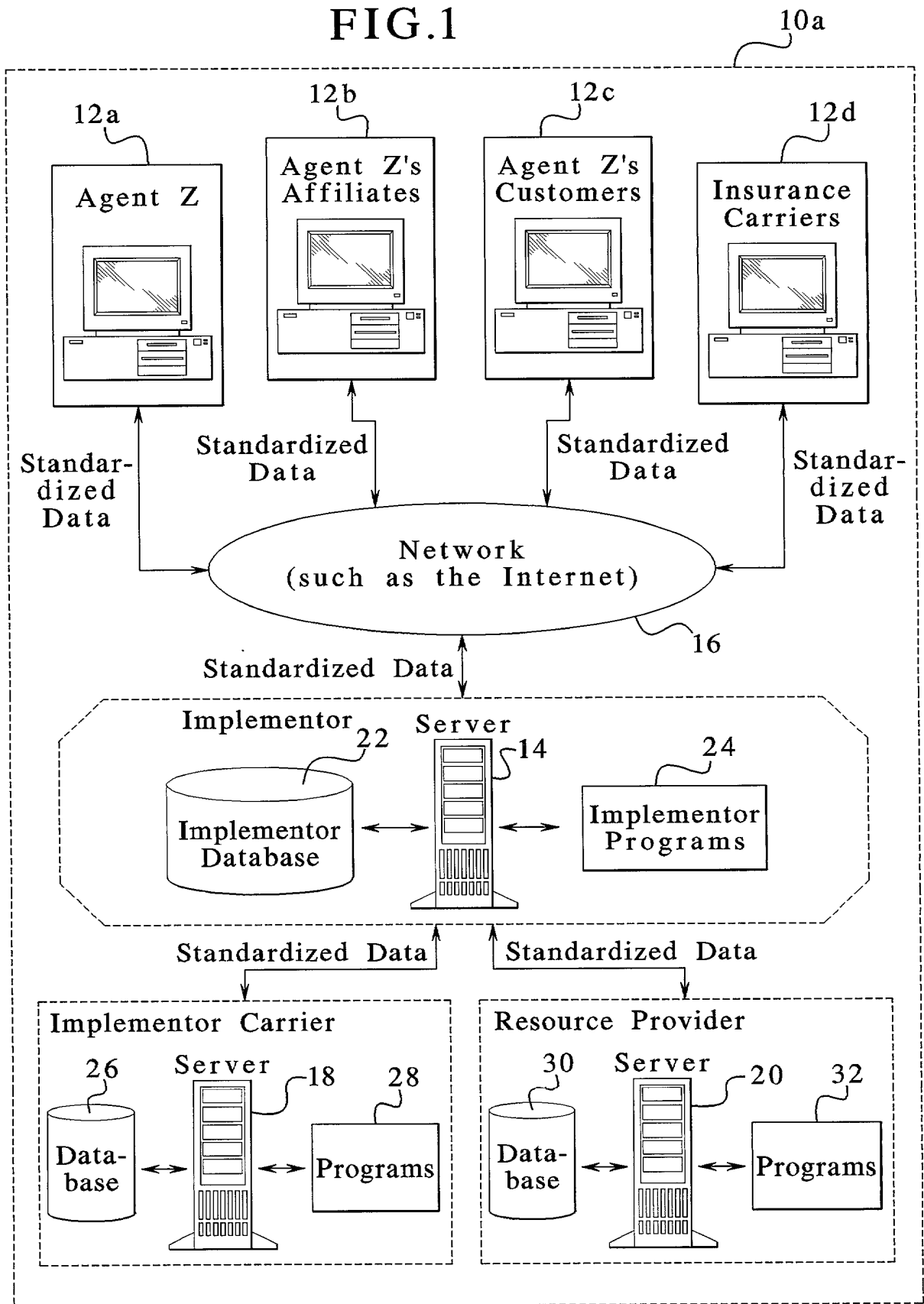


FIG.2

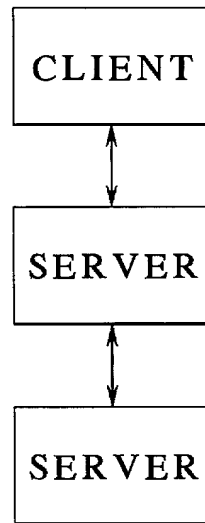


FIG.4

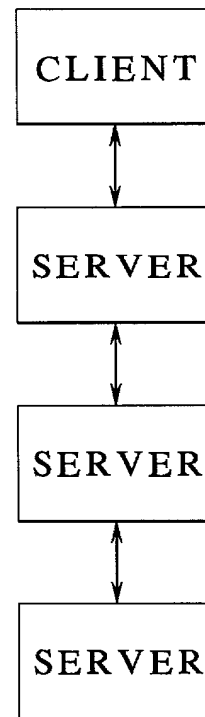


FIG.3

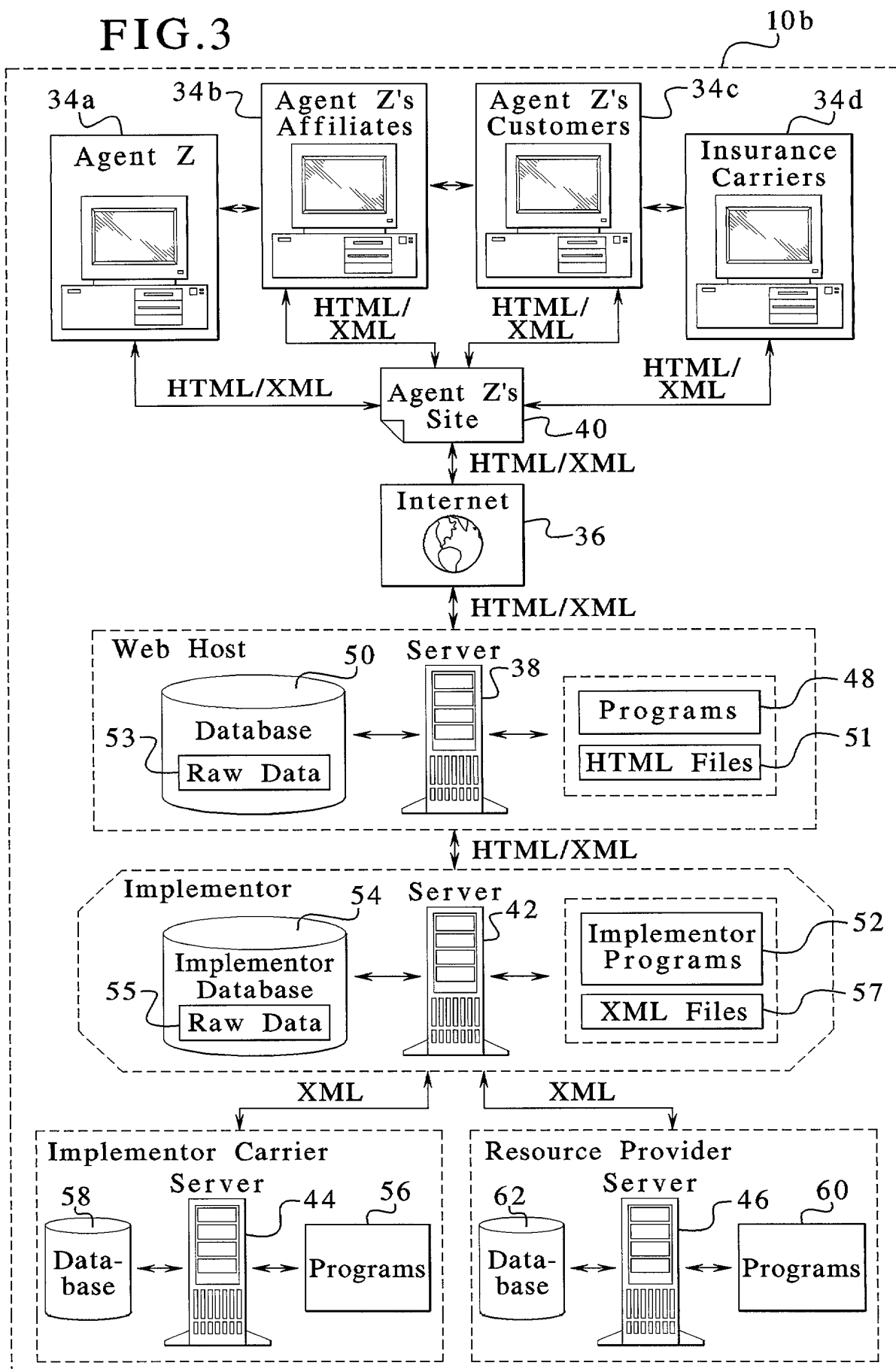


FIG.5

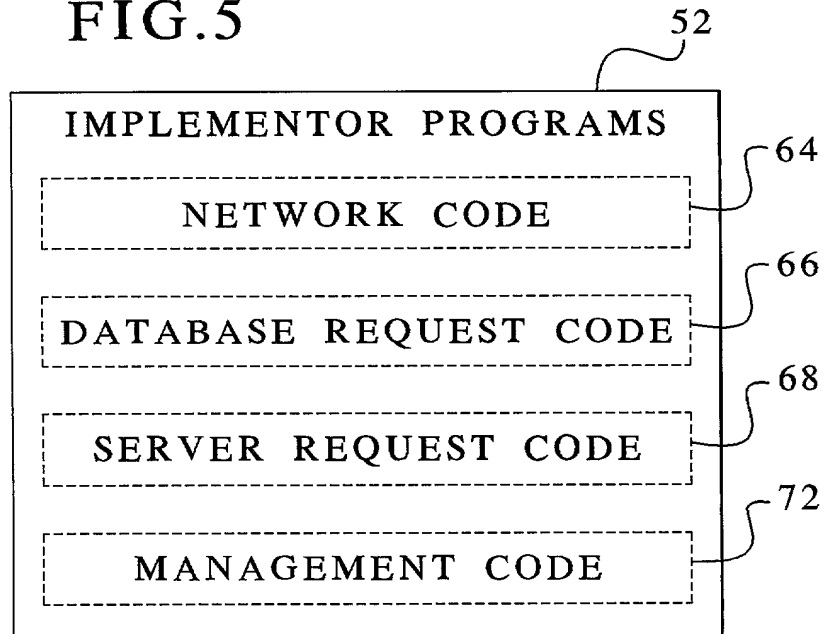


FIG.6

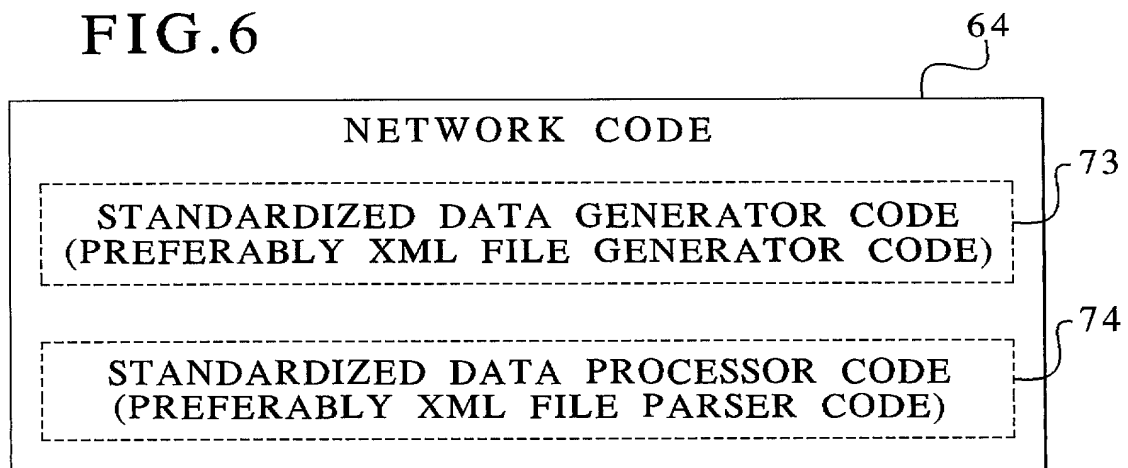


FIG. 7

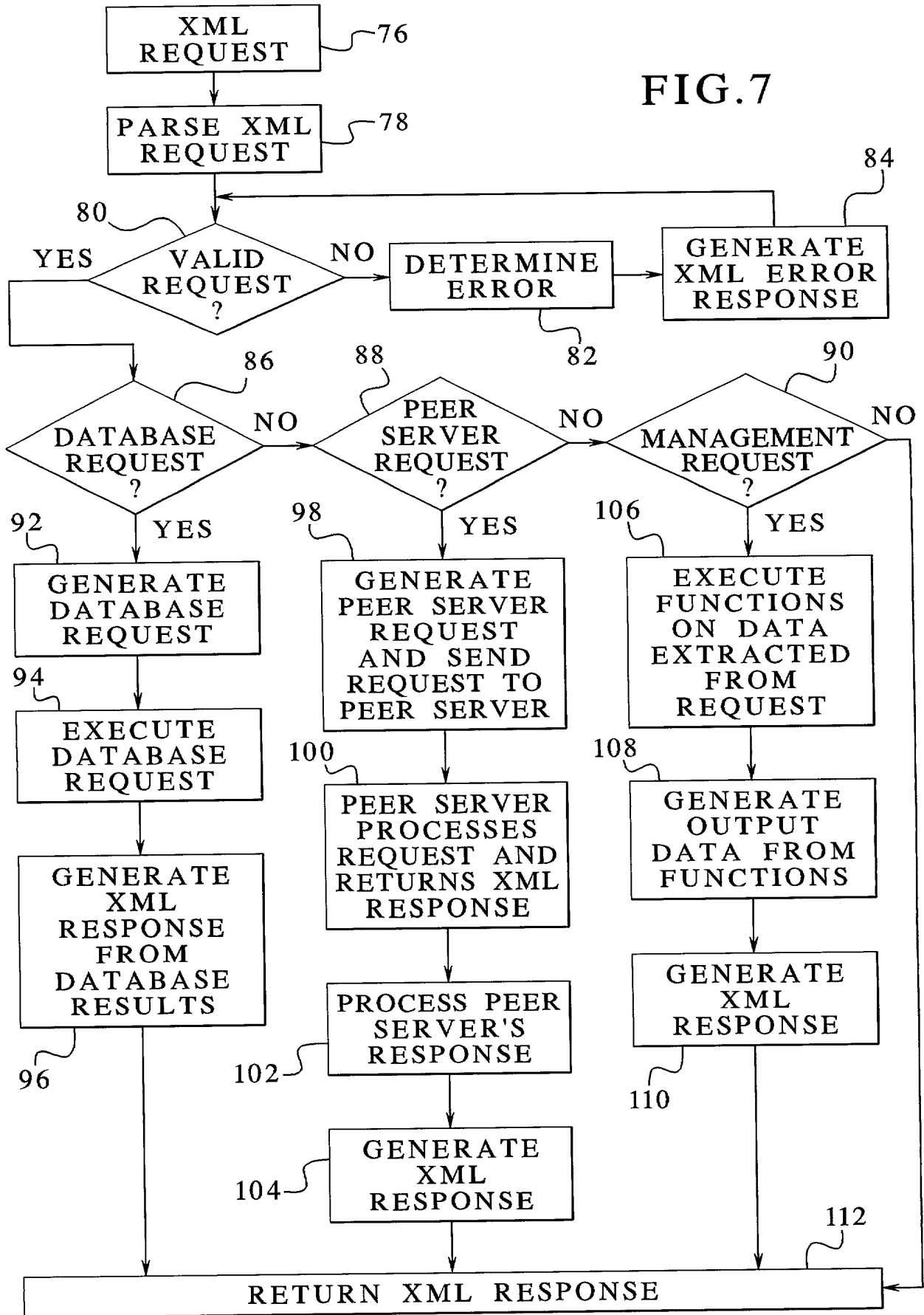


FIG.8

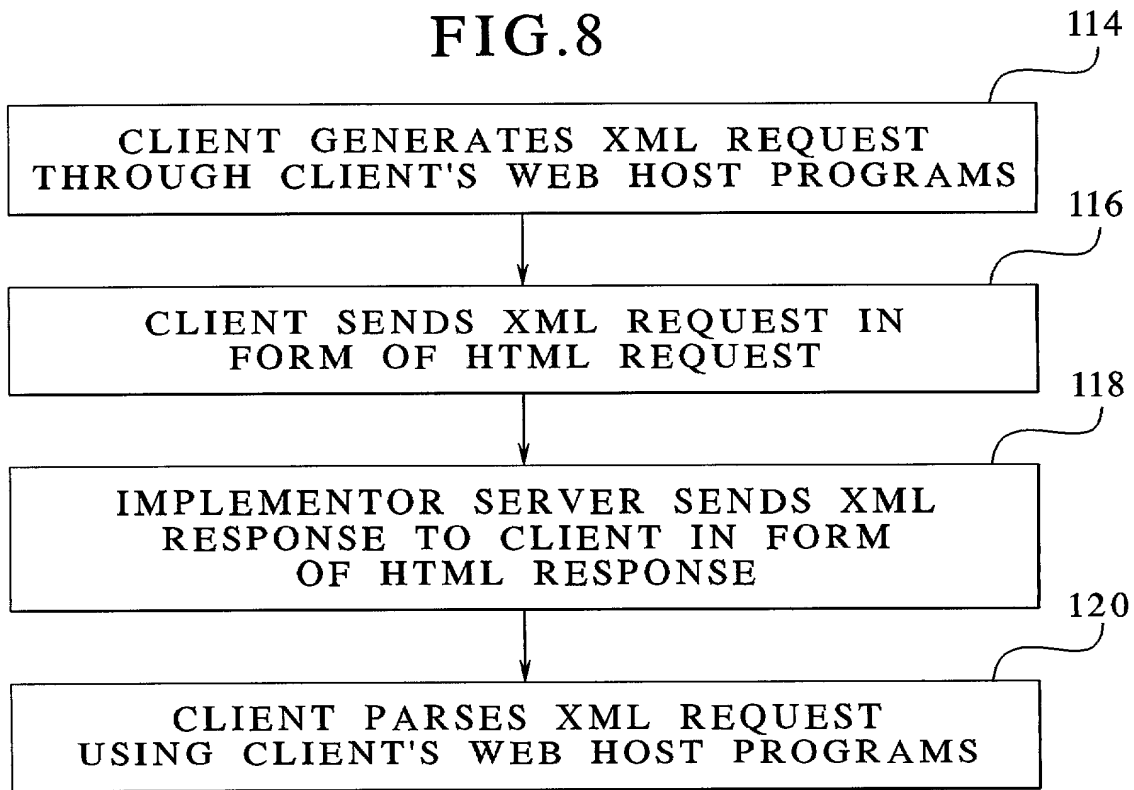


FIG.9

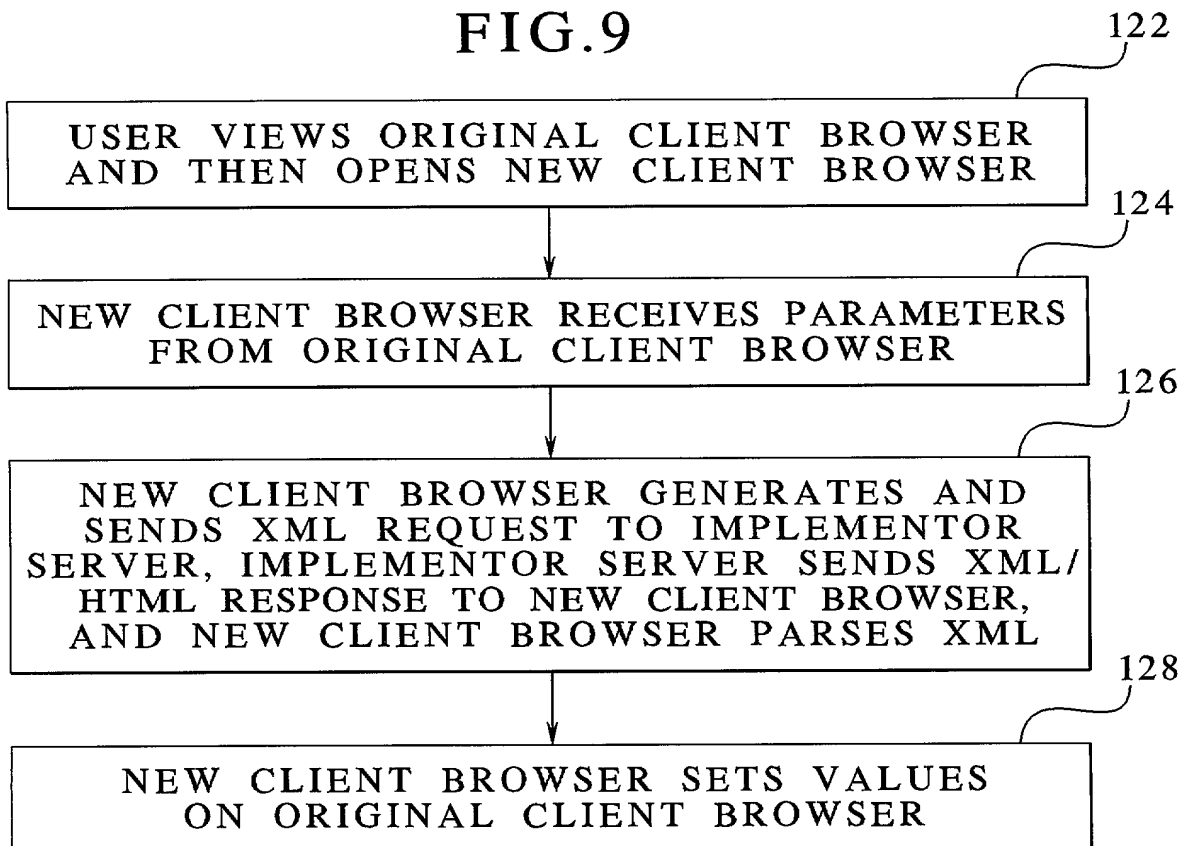


FIG.10A

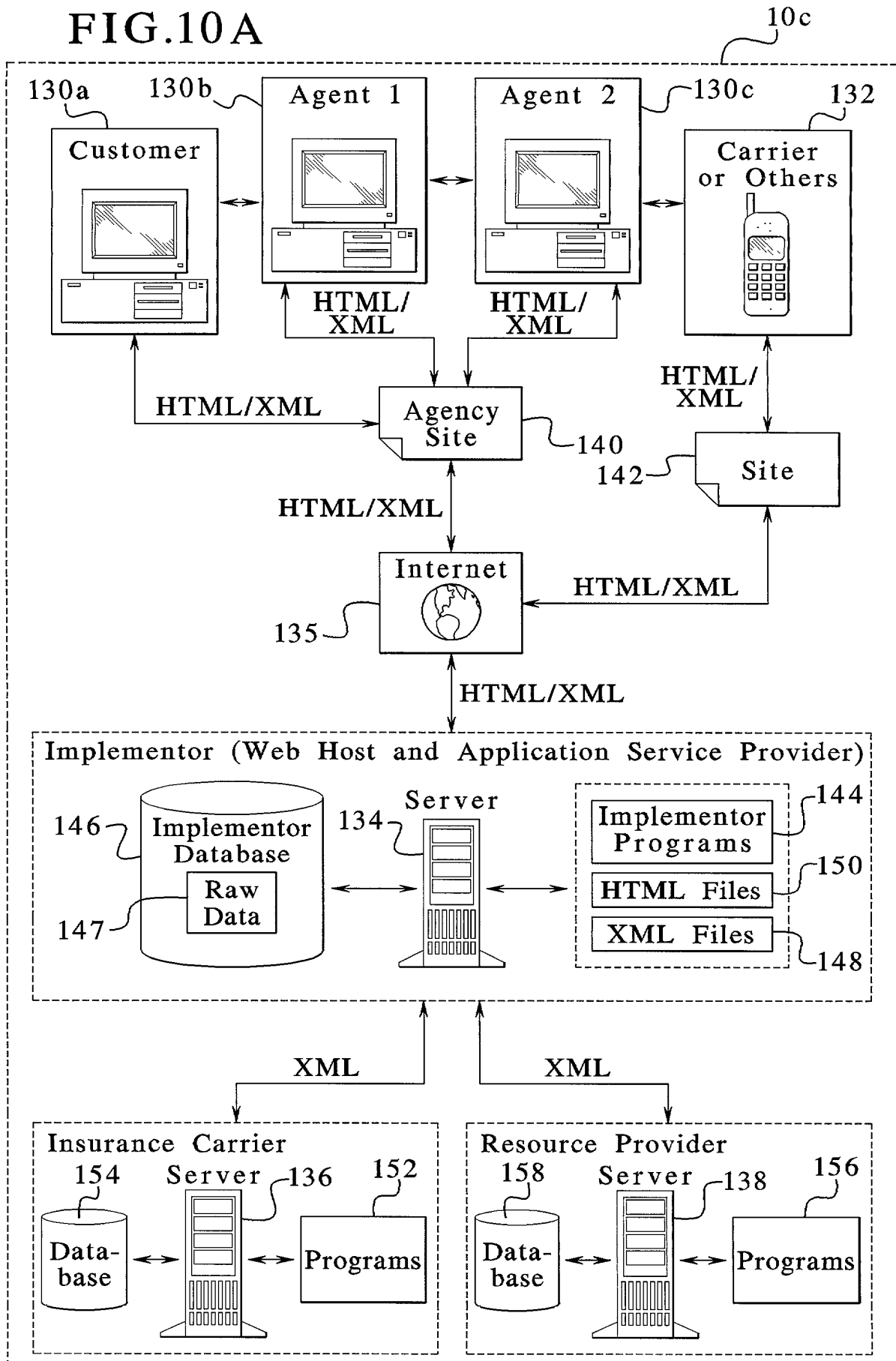


FIG.10B

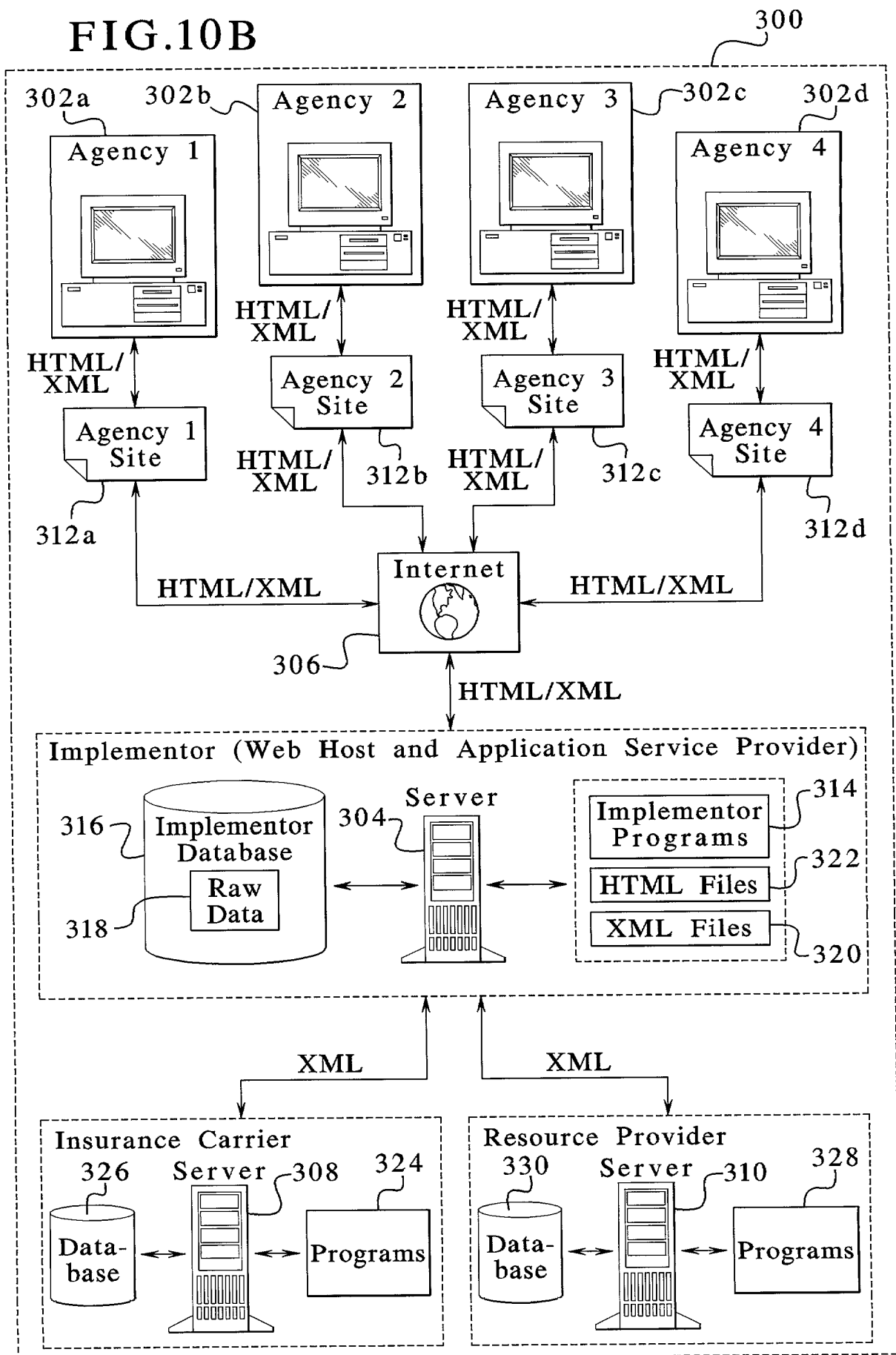


FIG.11

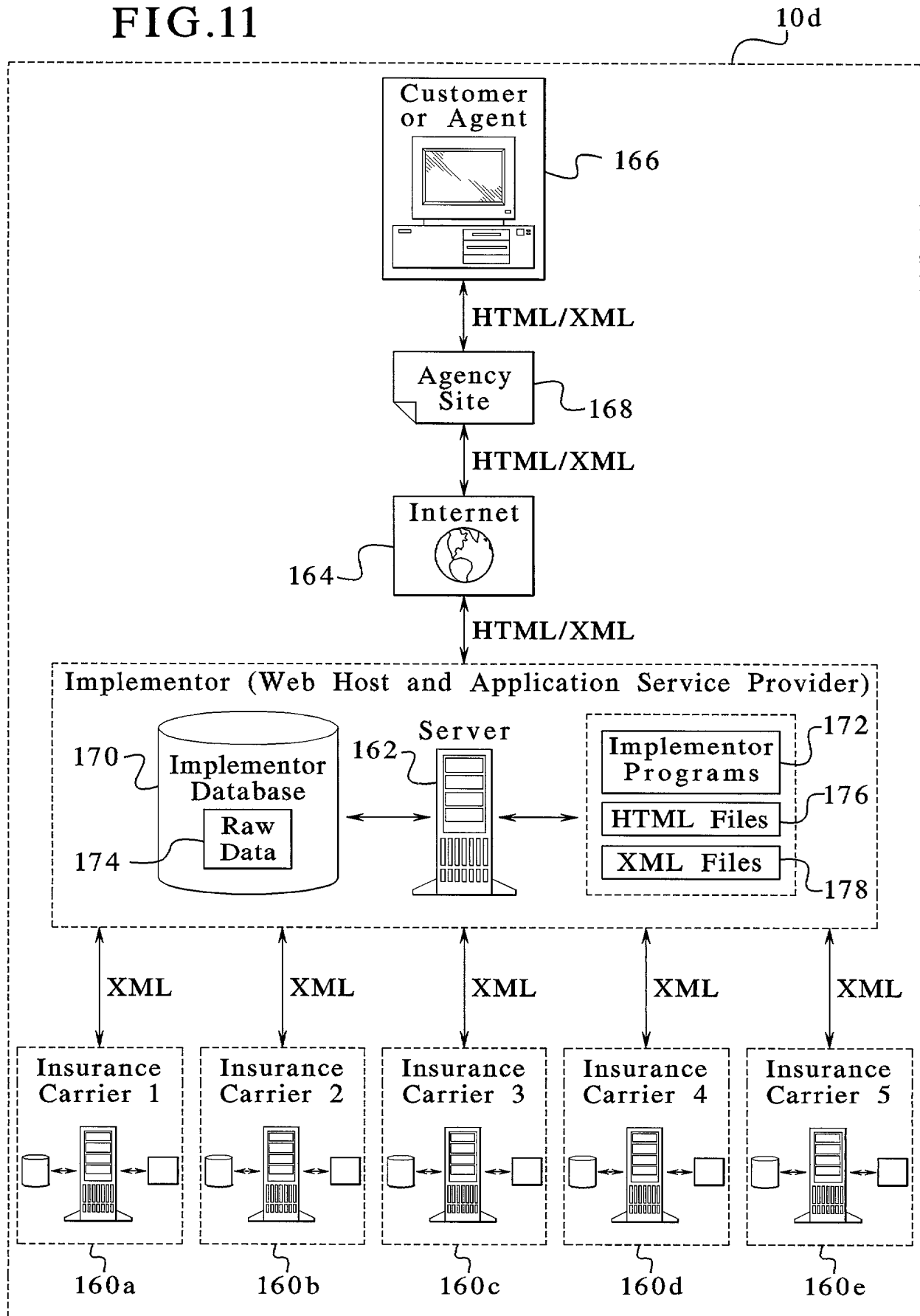


FIG.12

EXAMPLES OF ELECTRONIC INSURANCE TRANSACTION DOCUMENTS	
1.	Agent Contact Form for Customer
2.	Marketing Mailers
3.	Policy Applications
4.	Policy Quotes
5.	Policy Binders
6.	Issued Policies
7.	Policy Tracking Reminders and Forms
8.	Claims
9.	Invoices
10.	Other Documents

FIG.14

EXAMPLES OF SYSTEM TOOLS	
1.	Contact Information
2.	Account Creation
3.	Policy Creation
4.	Invoicing
5.	Payment Entry and Tracking
6.	Reporting
7.	Statements
8.	Searching
9.	Messaging
10.	Interfacing to Existing Accounting System
11.	Customization

FIG.13

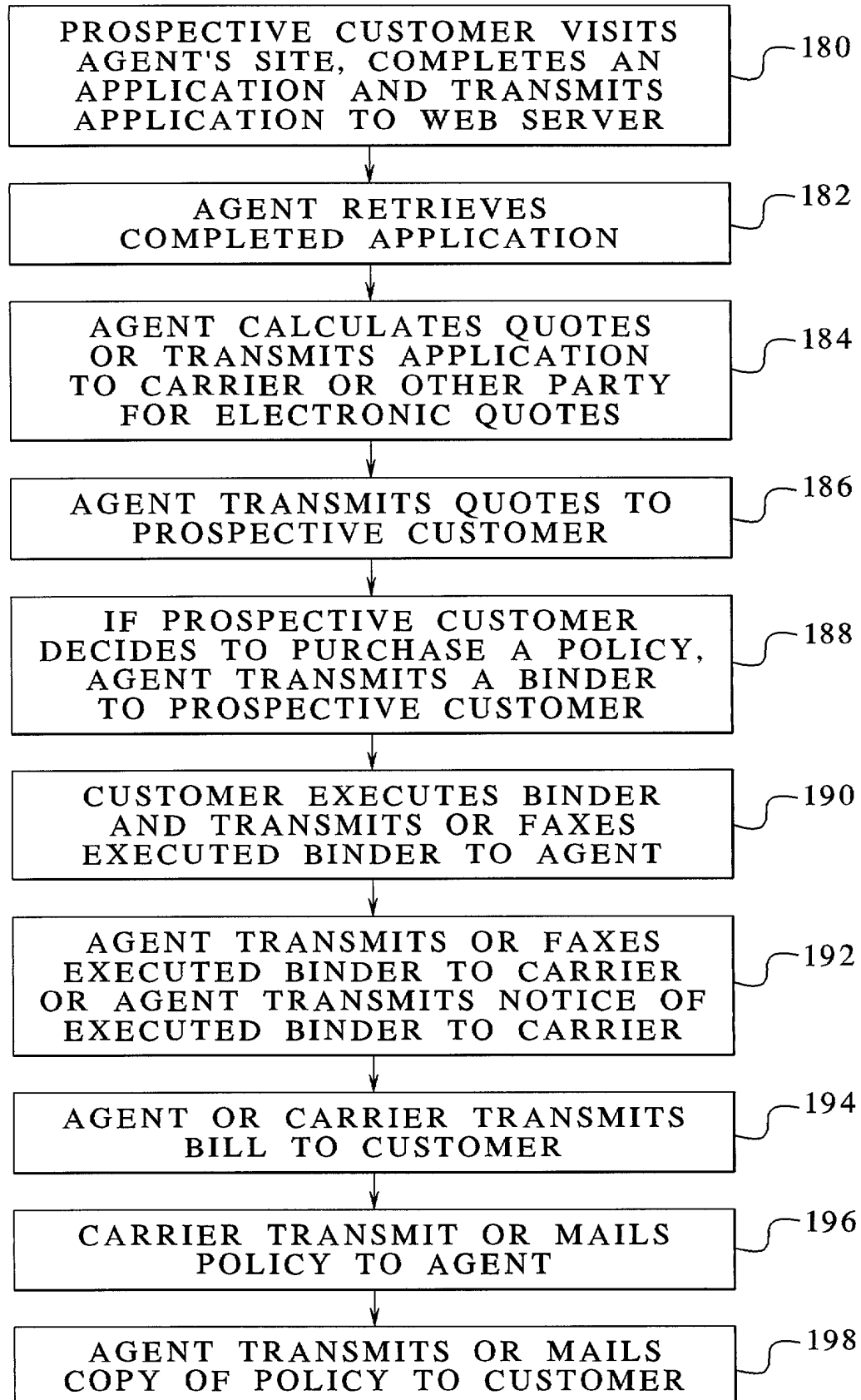


FIG.15

202

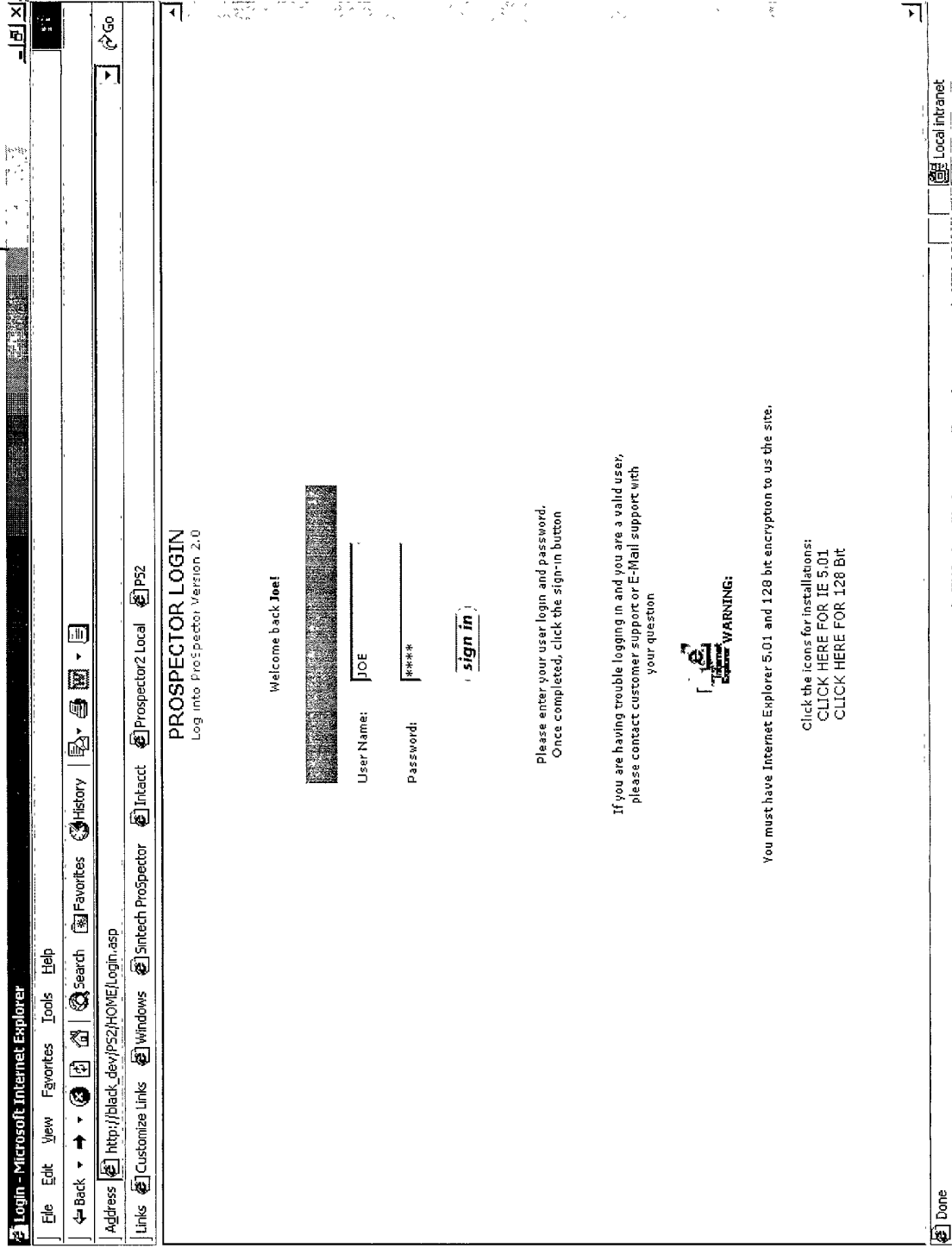
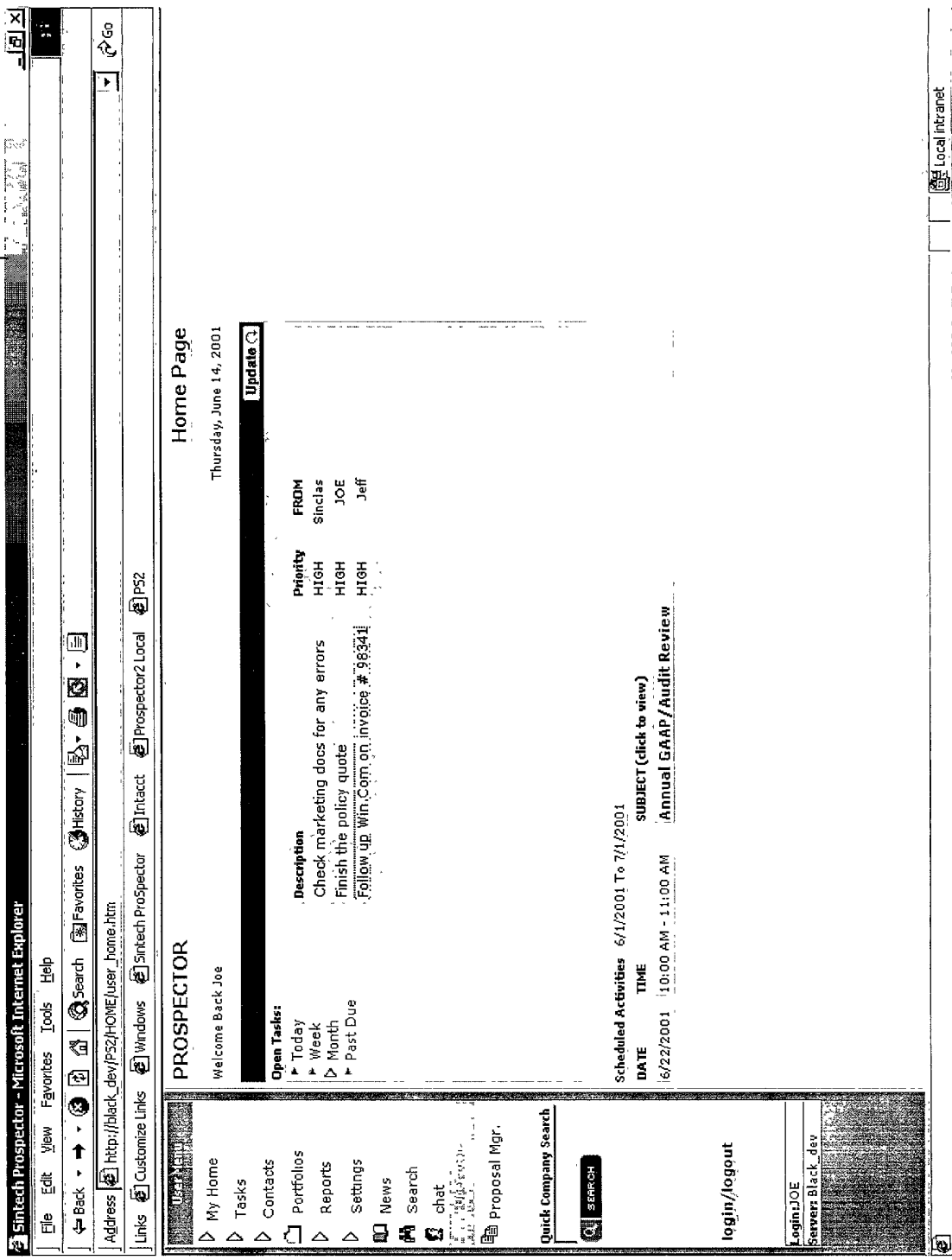


FIG.16

204





208

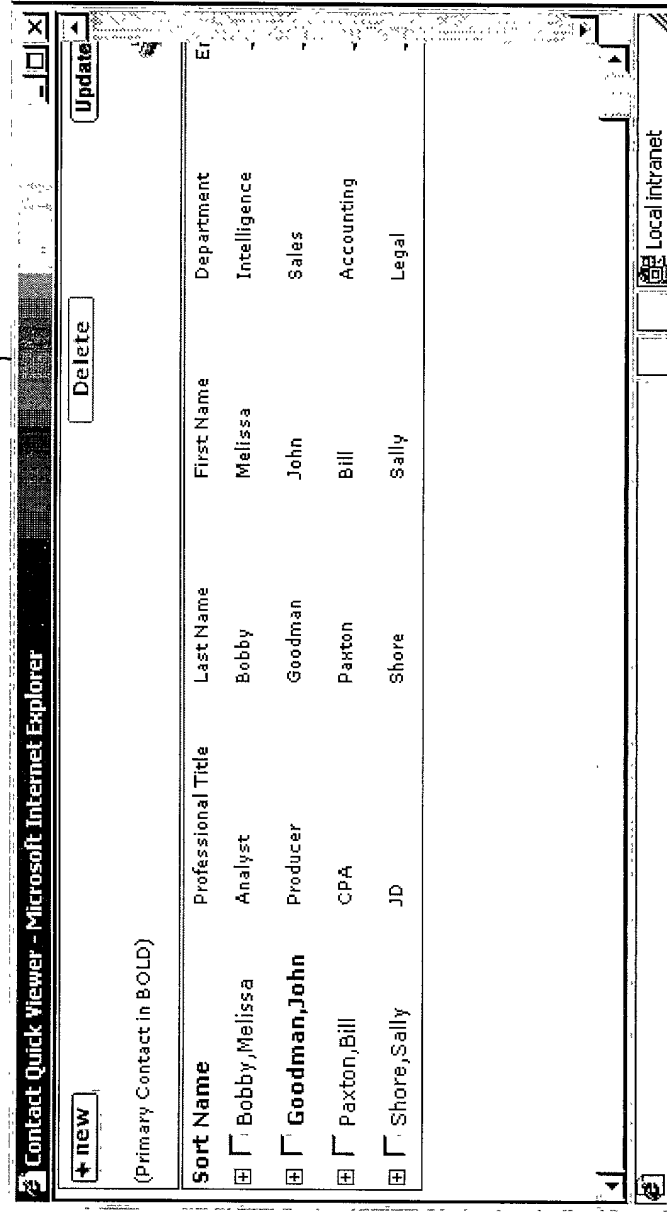


FIG.18

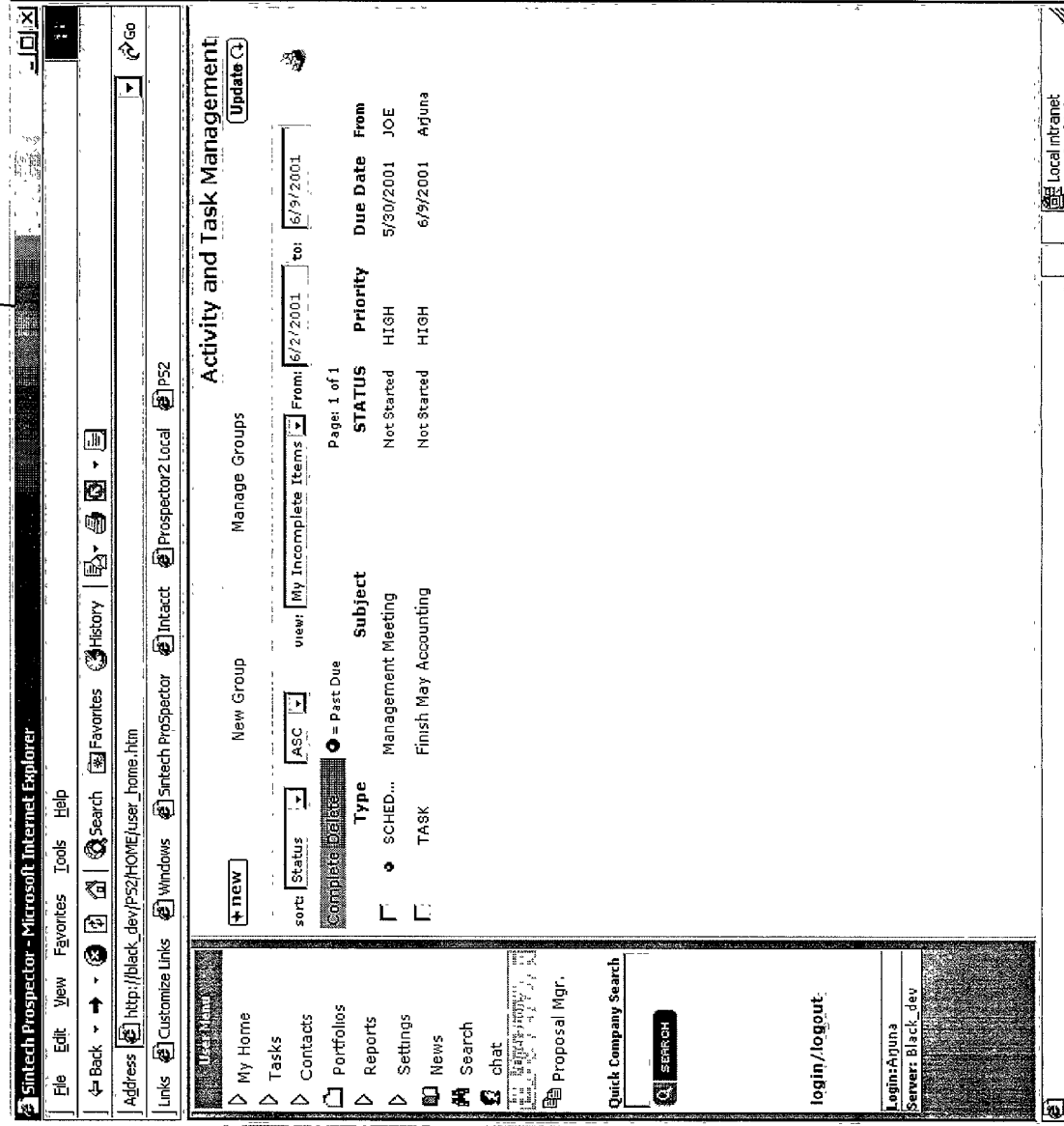


FIG.19

FIG. 20

212

Activity Editor - Microsoft Internet Explorer

ACTIVITY EDITOR

Assign To: Demo, Joe

Activity Type: TASK

Subject: Follow up Win.Com on Invoice # 98341

Priority: HIGH

Start Date: Time AM PM

End Date: Time AM PM

Due Date: 6/22/2001

Status: Not Started

Description: This invoice is past due, please call to find status

Last Modified: 5/31/2001 10:26:59 AM

Close Update

FIG. 21

214

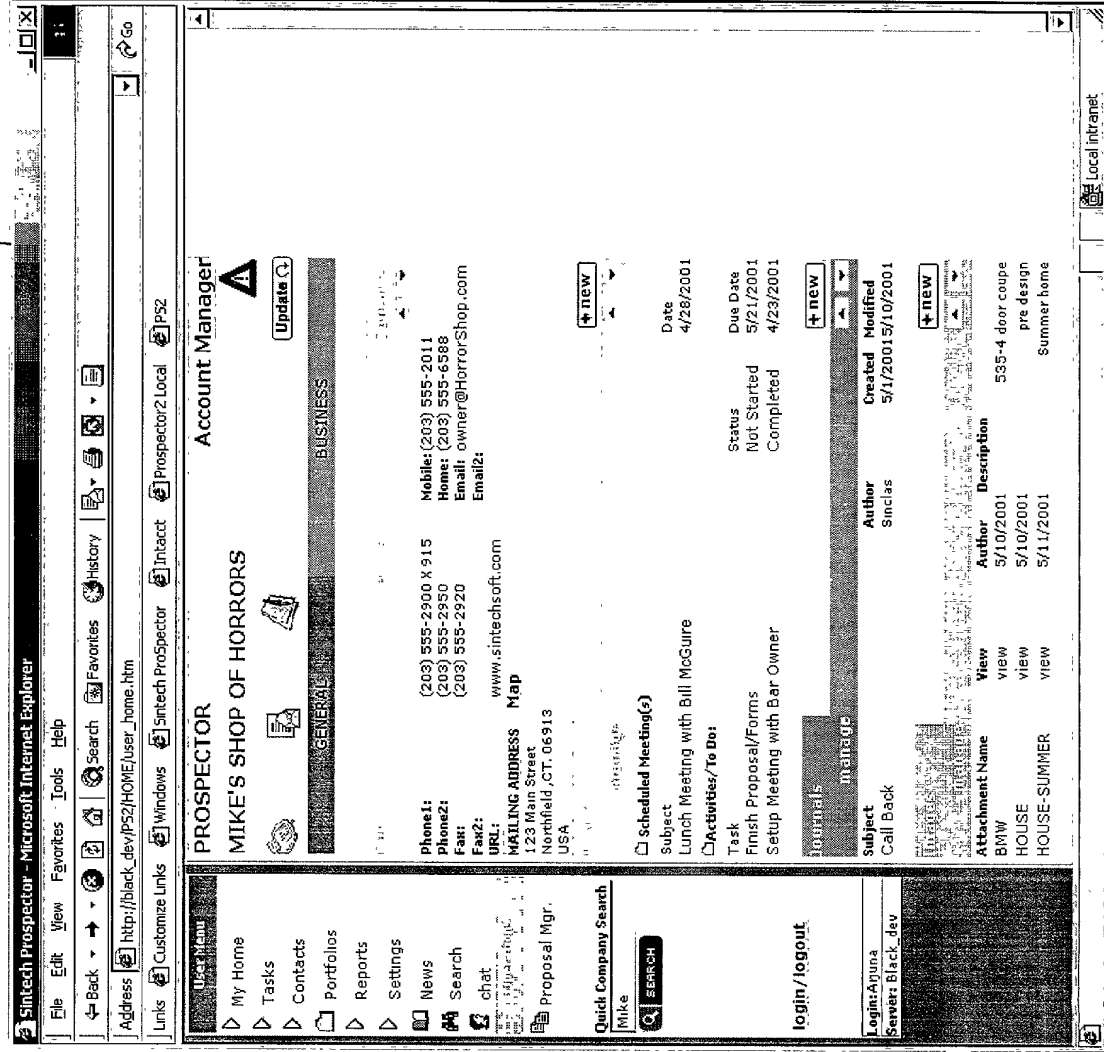


FIG.22

216

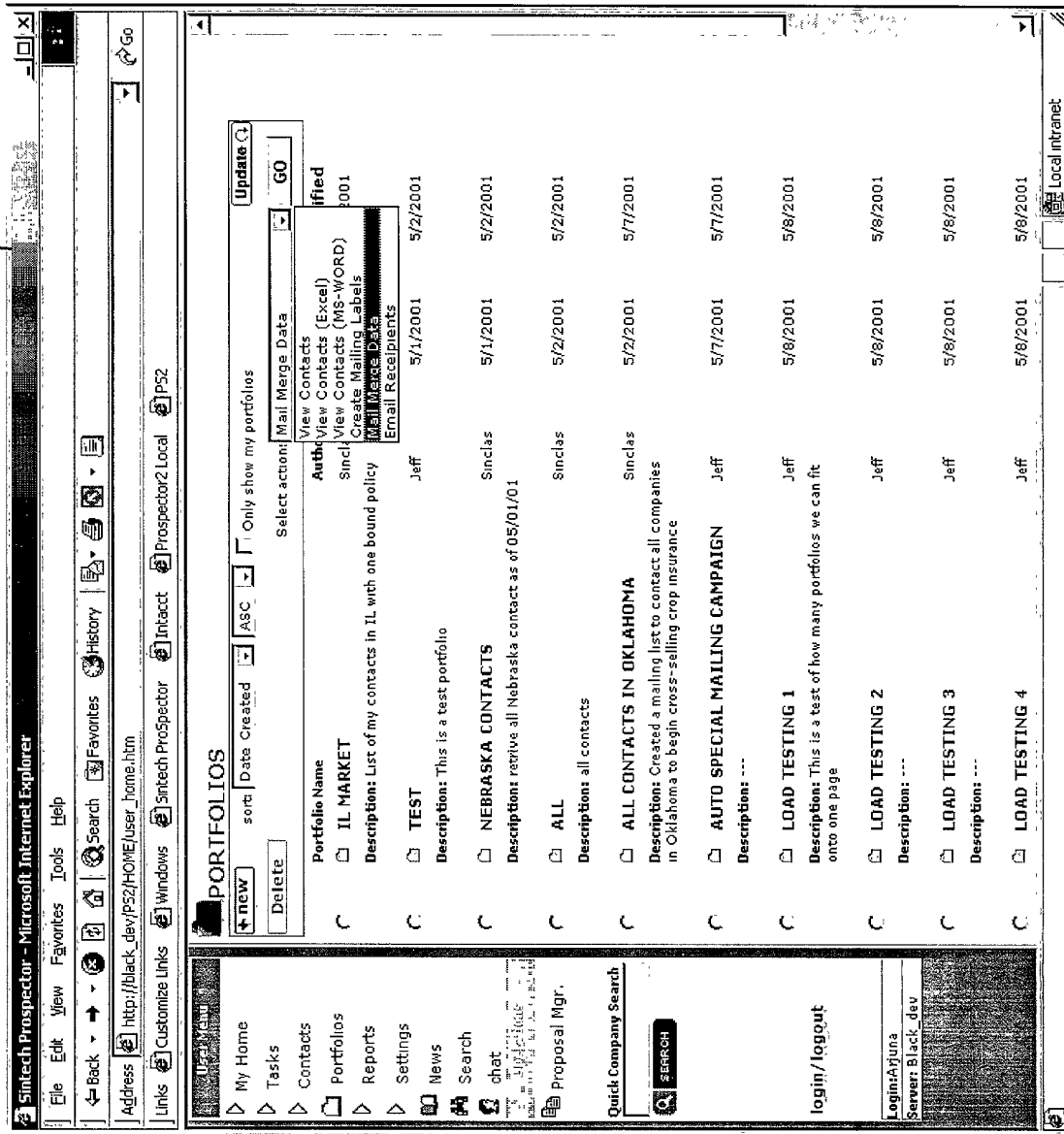


FIG.24

220

WORKERS COMPENSATION - Microsoft Internet Explorer

WORKERS COMPENSATION

POLICY INFORMATION		RATING INFORMATION	
Workers Comp (States)		select states	
Employer's Liability		EACH ACCIDENT	
		DISEASE-POLICY LIMIT	
		DISEASE-EACH EMPLOYEE	
Other States		select states	
Deductible		Amount	
MEDICAL		Amount	
INDEMNITY			
OTHER COVERAGES			
<input type="checkbox"/> U.S.L. & H	<input type="checkbox"/> MANAGED CARE OPTION		
<input type="checkbox"/> VOLUNTARY COMP	<input type="checkbox"/> FOREIGN COVERAGE		

Close | Accord Form | Quote | Update

FIG. 25

222

AUTO APPLICATION - Microsoft Internet Explorer

AUTO

Policy Number: **p90878-45678** Eft. Date: **6/5/2001** DATE: **6/5/2001** Exp. Date: **6/5/2002**

LOB CD: **AUTO** Act #: **1525.65** ☐ Direct ☐ Agency

Enter the status of this policy

Packet Sent: ☒ **Bound** Premium: **1525.65**

Plan Proposed: ☒ **LOCK**

Decision Pending: ☐ Reason: **Declined**

Declined: ☒ Reason: **Declined**

ASSIGNMENT

Agency: **GOOD AGENCY** Agent: **GOOD AGENCY**

Broker: **McComb&Wilson** MGA: **McComb&Wilson**

Carrier: **Hartford** Producer: **Hartford**

NOTE:

Close Acord Form Endorsement/History Quote Update

FIG. 26

Invoice Editor - Microsoft Internet Explorer

PROSPECTOR Invoice Editor

Add/Edit Invoice information. Click on Select Policy to view/hide additional Policy Information.

General

Select Policy: Producer: **Test User**

Premium: Auto Generate Invoice Number ☐ Invoice #:

Type: Billing: Branch:

Inv. Date: Due Date: Effective Date:

Accounting

Commission:

Broker Pct: Broker Comm.: Policy Fee: Carrier Fee:

Agent Pct: Agent Comm.: Inspect. Fee: Other:

Gross Pct: Gross Comm.: Exp. Const: Exp. Const %:

Monthly Earned Commission:

☐ Include Policy Fee ☐ Include Other Fee ☐ SL Filing:

Months: Monthly Comm: Stamping Fee: Fire Marshall:

Total Broker Amount: Other:

RECEIVABLE (Purchaser): ABC Grill

PAYABLE (Provider): Mutual Insurance Company

Total Fees:	100	Total Taxes:	0
Net Due:	979.37	Due Carrier:	728.62
Amount Received:	0	Amount Paid:	0
Balance Due:	979.37	Balance Due Carrier:	728.62

Look Up Look Up

Note: Testing Inv Num

Calculate Preview Update Close

FIG.27

226

Payment Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://black_onyx/MyBackOffice/Invoices/PaymentManager.asp?action=summary

Links Customizable Links Windows Sinterch Prospector Intact Prospector2 Local PS2

PROSPECTOR Payment Manager

Receivable Company Alpha Agency Look Up

Sort By: Invoice # For Invoice Date From 1/1/2001 To 5/31/2001

Show Closed Inv. (Entry Only) Payment Summary Update

Invoice #	Check #	Insured	Inv. Date	Pmt. Date	Paid/Rec'd	Amount
00V105		ABC Grill	1/22/2001	2/1/2001	Rec'd	1075
00V105		Per Se Technologies	1/22/2001	2/12/2001	Rec'd	500
00V105		Per Se Technologies	1/22/2001	2/12/2001	Rec'd	2612
01A444		Per Se Technologies	1/22/2001	2/12/2001	Rec'd	0
01A444		Per Se Technologies	1/22/2001	2/12/2001	Rec'd	100
01A444		Per Se Technologies	1/22/2001	2/12/2001	Rec'd	3024
01A444		Per Se Technologies	1/22/2001	2/12/2001	Rec'd	3124
01C101	5740	ABC Grill	1/22/2001	2/20/2001	Rec'd	979.37
011136	5740	ABC Grill	1/22/2001	2/20/2001	Rec'd	905
011136	5740	ABC Grill	1/22/2001	2/20/2001	Rec'd	1005
129	5740	ABC Grill	1/18/2001	2/20/2001	Rec'd	1495
130	5740	ABC Grill	1/19/2001	2/20/2001	Rec'd	3150
134	5740	ABC Grill	1/22/2001	2/20/2001	Rec'd	975
p450	5750	Mario's Pizza	1/19/2001	2/1/2001	Rec'd	9813.43
p450	5750	Mario's Pizza	1/19/2001	2/1/2001	Rec'd	9813.43

Done Local intranet

FIG.28

228

Provider Statement - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Carrier Statement

Business from 2/1/2001 to 2/28/2001

Thursday, June 14, 2001

TO: Mutual Insurance Company 1 Insurance Way IL, Glenview 60093 Phone: 847-909-7898 Fax 847-909-7898		FROM: SINTECH SOFTWARE 180 N Michigan Ave Suite 620 Chicago, IL 60601 Phone: 312-499-5130 Fax 312-499-5160	
--	--	--	--

Producer Bill Insured Policy # City Florists 3882011 Carrier Subtotal Carrier Total	Trans Type RNW	Coverage PC	Effective Date 2/8/2001	Expiration Date 2/8/2002	Premium 13,100.00 13,100.00 13,100.00	Fees+ Gross Comm. Taxes 0.00 0.00 0.00	% Gross 22.00%	Paid To Company 0.00 0.00 0.00	Due Company 10,240.00 10,240.00 10,240.00
---	-----------------------------	-----------------------	--------------------------------------	---------------------------------------	---	---	--------------------------	---	---

FIG. 29

230

Producer Statement - Microsoft Internet Explorer

File Edit View Favorites Tools Help

TO:
Alpha Agency
37 State Street Suite 652
Chicago, IL 60605
Phone: 312-499-5151 Fax 312-499-5151

FROM:
SINTECH SOFTWARE
180 N Michigan Ave Suite 620
Chicago, IL 60601
Phone: 312-499-5150 Fax 312-499-5160

Business from 2/1/2001 thru 2/28/2001

Producer Open Item Statement

Open Invoices and Current Activity						
Insured	Policy #	Type	Invoice #	Date	Charges	Balance
City florists	3882011	RNW	01C101	2/8/2001	Post Fee 13,485.00	11,925.00
Manual Insurance Company					Commut+Pents 0.560.00	
					Other ADJ 0.00	
						(1,560.00)
TOTAL						\$11,925.00

FIG.30

232

Report Builder - Microsoft Internet Explorer

WELCOME to Report Builder!

Report Name: test

Description: This is a test report that contains Policies and Insureds.

☒ Make this report read-only for other users:

Last Modified: 5/1/2001 2:55:00 PM

STEP 1

Close

Save

<< BACK NEXT >>

Local intranet

FIG. 31

234

Report Builder - Microsoft Internet Explorer

DISPLAY FIELDS

Sort By: Contact

Available Fields

- #DecisionsPending
- #Declined
- #DeclinedEmps
- #PendingPremium
- #PlansProposed
- #Sold
- #SoldEmps
- #SoldPremium
- Chapter Name
- CommName
- Contact Type
- Date Modified
- Department
- Employee Number
- Fax1
- First Name
- IndexName
- Last Name
- Mailing Address
- Mailing City

Select: --optional--

Selected Fields

- CommName
- Primary Contact
- Mailing Address
- Mailing City
- Mailing State
- Postal Code
- Mailing Country

UP DOWN

STEP 2

Close

Save

<< BACK NEXT >>

Local intranet

FIG.32

Report Builder - Microsoft Internet Explorer

FILTERS

+ ADD FILTER - REMOVE FILTER

Filter	Relationship	Value
<input type="checkbox"/> CommName	Greater Equal	k
<input type="checkbox"/> OR Mailing State	Equal To	IL,NE
<input type="checkbox"/> AND Mailing City	Equal To	Chicago

ie: IL,IN,CA

Sort Field: CommName Direction: ASC

STEP 3
Close

<< BACK NEXT >>

Save

Local intranet

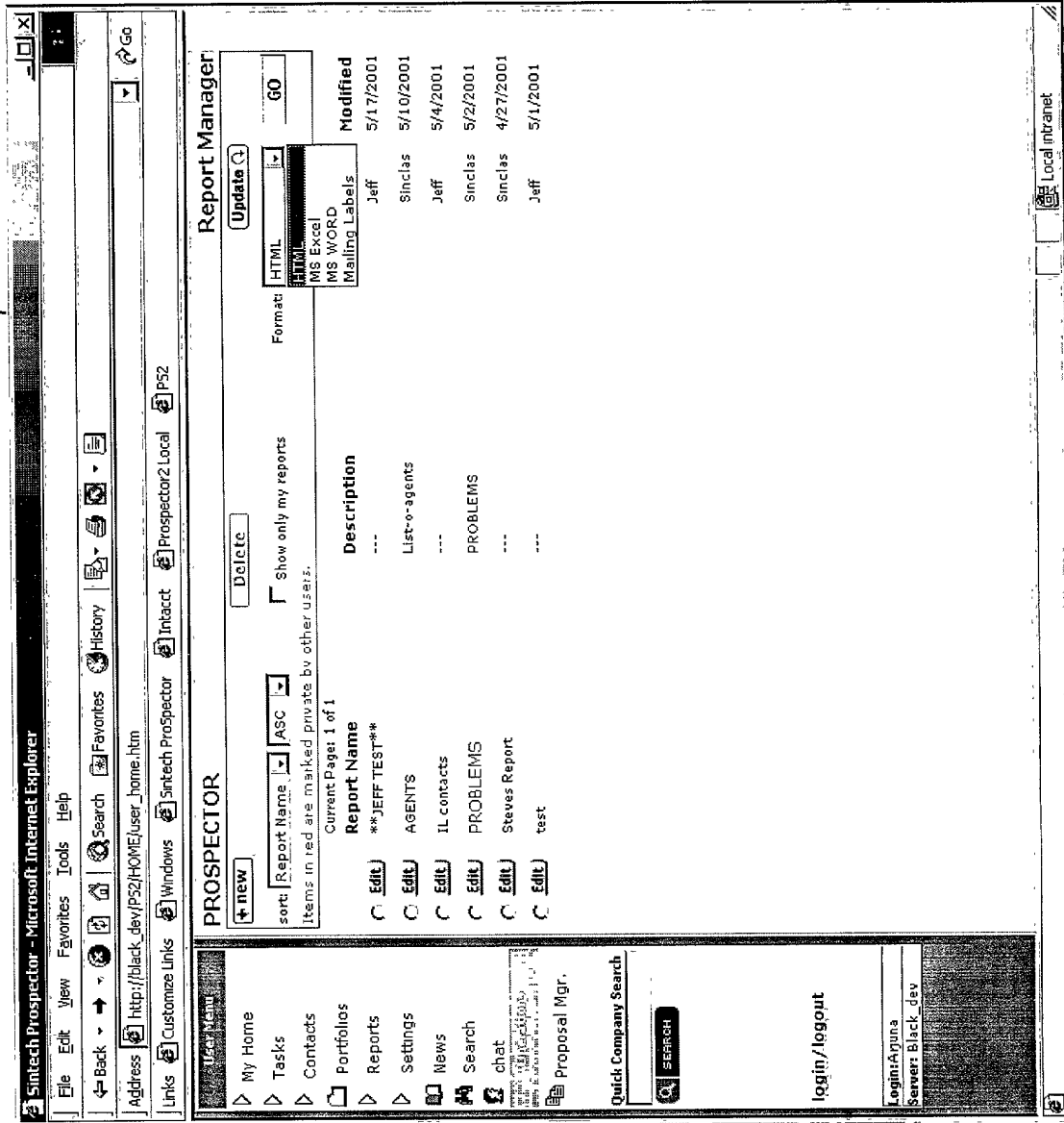


FIG.33

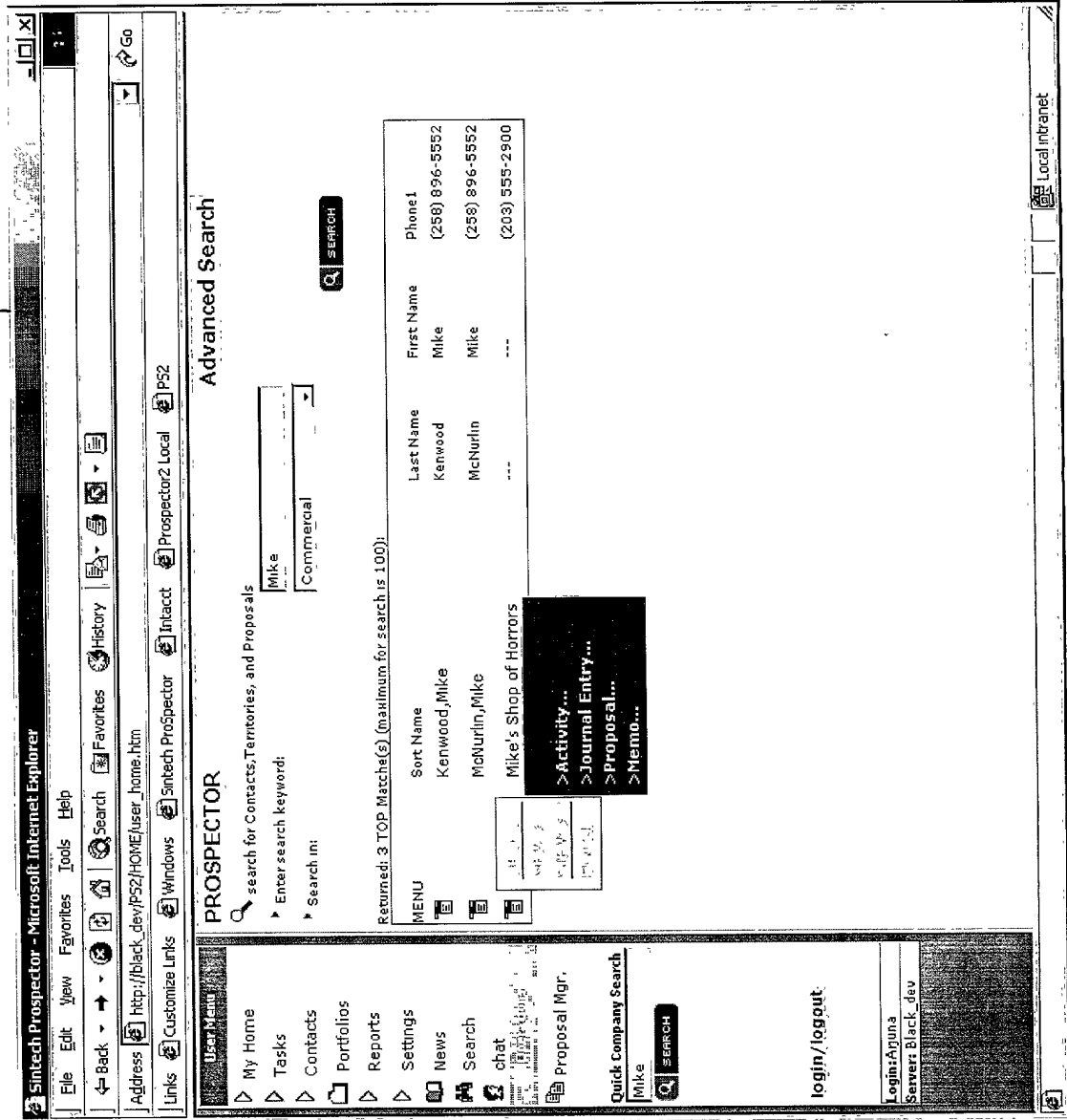


FIG.34

FIG.35

242

